



## PRIVATE CLIENT SERVICES

### Our Commitment...

**We always listen. We're always here for you.**

#### COLLABORATION, NAVIGATION & SIMPLIFICATION

Alvarez & Marsal Private Client Services is dedicated to helping clients successfully manage wealth and plan for the future by acting as the family CFO overseeing all aspects of their personal and business interests. Our priority is to work with clients to achieve their long-term goals and deliver highly personalized solutions that suit our client's unique needs. We serve as your advisor, advocate, teammate and partner maintaining the anonymity and security you desire.

As part of a successful global professional services firm established in 1983, our extensive team of tax and accounting professionals are located all across the U.S. to provide clients with customized and tailored solutions. Our practice is committed to the highest ethical standards, seamless execution and value delivery, while maintaining the anonymity and security you desire.



#### **Consolidated Financial Reporting**

A clear and comprehensive view of both personal and entity-level financials, enabling a full understanding of the overall financial picture streamlining decision making and insight.



#### **Mastro Investment Reporting**

The Mastro platform offers advanced consolidated investment reporting, providing a clear, real-time view of all holdings.



#### **Cash and Expense Reconciliations**

We identify discrepancies, prevent fraud, and ensure that all financial transactions are closely monitored and accurately recorded.



#### **Financial Budgeting, Forecasting and Analysis**

Accurate budgeting and forecasting ensures that resources are allocated efficiently, providing insights into performance allowing for strategy adjustments as needed.



#### **Concierge and Bill Pay Services**

Let us simplify your life by handling routine payments and enhance your lifestyle by addressing both financial and non-financial tasks.



#### **Special Situation Advisory**

Management of complex scenarios like insurance reviews and health claim management, advisory for aviation purchases or leases, and developing legal entity strategies to name a few.



#### **Estate Structuring and Advisory**

Independent advisory for effective wealth transfer and tax optimization, ensuring that family estates are aligned with future financial goals.



#### **Data and Document Repository**

Centralization of data enhances efficiency, simplifies record-keeping, and ensures that important information is available for decision-making, compliance, and reporting.



#### **Fiduciary and Trust Accounting**

Let us simplify your life by handling routine payments and enhance your lifestyle by addressing both financial and non-financial tasks.



#### **CFO Services**

As an outsourced CFO, we play a critical role in overseeing budgeting, cash flow management, and tax planning, aligning all financial activities with the family's objectives.



#### **Maritime and Aviation Reporting & Strategy**

Strategic planning ensures efficient asset management by addressing operational, financial, and legal considerations.



#### **Real Estate and Investment Analysis & Underwriting**

Independent assessments of real estate and other direct investments help to manage and understand risks effectively ensuring informed decision-making and outcomes.

# How We Do It

## PRIVATE CLIENT SERVICES AT THE CENTER OF IT ALL

Our practice is designed to complement and work with your advisors. We bring our clients peace of mind by collaborating, connecting on and overseeing an intricate network of professionals.



- Dedicated teams led by experienced senior professionals
- Streamline processes and procedures to improve financial reporting
- Create meaningful deliverables and actionable plans



- Craft financial scenarios, so you can write the next chapter
- Establish new family structures
- Provide estate/trust planning



- Provide financial and tax guidance
- Support stakeholders and the future

## For More Information, Contact Our Experts



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Our Services**

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## ABOUT ALVAREZ & MARSAL

Founded in 1983, Alvarez & Marsal is a leading global professional services firm. Renowned for its leadership, action and results, Alvarez & Marsal provides advisory, business performance improvement and turnaround management services, delivering practical solutions to address clients' unique challenges. With a world-wide network of experienced operators, world-class consultants, former regulators and industry authorities, Alvarez & Marsal helps corporates, boards, private equity firms, law firms and government agencies drive transformation, mitigate risk and unlock value at every stage of growth.

To learn more, visit: [AlvarezandMarsal.com](https://www.alvarezandmarsal.com)

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